Dear Colleague:

Welcome to Patient Flow Analysis (PFA) version 2.0, a tool designed for use in planning and evaluating clinic operations. This instructional letter details installation of the PFA software and updates you on other related issues.

First, information about our remedy for PFA v.2's so-called Y2K bug, discovered in late 1999: The current version of PFA is bug-free, but now produces a rather idiosyncratic output with regard to its referencing the study year. Programming difficulties and time constraints forced us to accept less than the ideal. Consequently, unless you have access to Epson's, Okidata's, or Panasonic's color dot-matrix printers (the only printers for which we can offer non-standard, "non-generic" printer drivers), then all references to the year you conduct your PFA studies will begin with "19" (for example, the graph and the statistical tables for the first study you do this year will show the year as "1900"). For those with any of these 3 printers, the graph alone will correctly display the study year. Should you have any questions about this issue, please contact me.

<u>Introduction to Installation:</u>

For users of *Windows 95, 98, and 2000 operating systems,* the PFA v. 2 installation procedures are now quite similar to those used for most windows-compatible applications. Follow the directions shown below.

DOS users (that is, those not running Windows) and *Windows 3.1* users, should instead follow DOS installation described further below. These users should follow the Printer Set-up described for Windows 95, etc.

Users of Windows ME, please note: As PFA v. 2 is a 16-bit program, it will not run on Windows ME operating systems that do not have DOS-enabling patches installed (few ME operating systems have this). Until CDC issues its WinPFA (during the next 6 months), I encourage these users to arrange temporary use of computers with any of the above-listed operating systems.

Installation FOR* Windows 95, *98, and 2000 USERS:

Follow this 3-step process: Installation, Configuring, and Printer Set-up. *But, before proceeding, please read the following two notes:*

- *First, consult with your computer-support staff, before attempting any installation.*
- *Second, If these procedures do not result in a successful installation of PFA, please request our direct technical assistance; my phone number and e-mail address are listed at the bottom.*

To install PFA v. 2, please follow these steps:

1. From your Windows desktop, select (click) "START"; then select "Run";
2. At the "Run" window, enter the drive where you have placed the PFA installation software (probably drive A:); select "Open";
3. At the "A: Drive" window, double-click the file shown, "Install.exe"
4. Next, within the "WinZip Self-Extractor" window, notice "c:\pfa" in the small window next to the "Browse" button; "c:" is the default drive and "pfa" the default folder where you may choose to install PFA.
5   Keep "c:\pfa" as your PFA drive and folder or enter a different drive and folder;
6. Next, select "Unzip" to proceed with installation;
7. A "WinZip Self-Extractor" dialogue box displays the note "64 files have unzipped successfully"; select "OK";
8. From the "WinZip Self-Extractor" window; select "Close";
9. Finally, close the Control Panel window by double-clicking the icon on the upper-left corner or single-clicking the "X" on the upper-right.

You have now installed PFA. Next, you will want to create a PFA short-cut (that is, a desk-top icon) and also configure PFA to run efficiently under Windows. **Note to users of Windows 2000**: Create the short-cut only (through item 6), skipping items 7-10; your operating system will configure PFA automatically for you.

Please follow these steps:

Creating a Short-Cut and Configuring PFA

1. From your Windows' desktop, right-click on any vacant space, accessing a drop-down menu. From the menu, highlight and select "New"; then highlight and select "Shortcut"; next, select "Browse";

2. From the "Browse" window, click the — at the right-hand side of the small "Look in" window at the top of the screen; click to highlight and select the drive where you just installed PFA; notice that your "PFA" folder (either "PFA" or the folder-name you chose) now displays in the larger window below;

3. Next, if necessary, slide the movable selection bar at the bottom of the screen to display the folder where you installed PFA; then, highlight and select (double-click) that folder. (Remember that the default drive and folder is c:\pfa);

4. Then, select (double-click) "PFA.bat" (this file may be named, "PFA");

5. Now, select "Next"; then either accept the name appearing in the "Select a name for the shortcut" window or rename it. Again, select "Next";

6. Next, highlight and select the icon for PFA you wish to see displayed on your Windows' desktop, then, select "Finish";

7.   Again, from your Windows desktop; use your right-mouse to highlight and
       select the PFA shortcut you just selected; select "Properties" from the
       drop-down list;

8.   Next, from the "PFA.bat Properties" window, select the "Program" tab;

9.   Then, click to check "Close on Exit"; again click to select "Advanced";
       then check "Prevent MS DOS based programs from detecting Windows"; and
       select "OK";

10.   Now, from within the "Conventional Memory" box, select the "Memory" tab;
       select "Protected" and, in the "Initial Environment" window, select
       "1024" from the drop-down menu; finally, select "OK."

You have now completed both the Installation, Shortcut and Configuration
steps. To run PFA, from your desktop, double-click your new PFA icon.

Printer Set-up:

As with the software installation, please involve your computer-support staff
with setting up printing for PFA. An additional resource, possibly more
difficult to secure for some users, is a dot-matrix printer. As the graph for
most new PFA users is more easily understandable than PFA's other generated
output, the statistical tables, choice of a printer that can faithfully
reproduce the graph is critical: The graph's unusual format challenges most
printers except dot-matrix ones. Consequently, a dot-matrix printer is the
only one I can recommend for PFA's generated reports. Admittedly, some users
in the field have reported obtaining very satisfactory output with more
contemporary laser printers, but, generally, the output is poor.

More critical information about your printer:
T   PFA's standard printer driver (coming with the software) is for
       non-color Epson-language-compatible dot-matrix printers.
T   The standard driver for color printers is for the Epson 850 and 2550
       printers.
T   The only other color printers for which CDC offers printer drivers are
       the Okidata 590/591/395C and the Panasonic PKX-2135; these drivers also
       come with the PFA software.
T   To replace the Epson color driver with the driver for either the Okidata
       or Panasonic printer is a 1-step operation: Using DOS or your Windows
       file manager, replace _without re-naming_ PFA's "Hp.exe" file with
       "Okidate.exe" (for the Okidata color dot-matrix printer) or "Pana.exe"
       (for the Panasonic).
T   If your computer is in a LAN and you use a networked printer, then
       consider identifying one printer for DOS programs (including PFA) and a
       separate printer for Windows programs.

FOR DOS USERS:

Below, you will find the routine DOS installation procedure as well as an
alternative DOS installation procedure (to be used only if the routine DOS
installation appears not to work). Both require your using DOS commands;
alternatively, if you are running Windows 3.1 and you have access to a file
manager program, you may be able to use the file manager to effect
installation of PFA to follow the steps below:

Routine DOS Installation:

1. Change the "prompt" to the drive where you inserted the PFA diskette (for most users, this is their "A:" drive).

2. Type: "PFAINST" and follow PFA's on-screen instructions. The final instructional step covers your computer's **CONFIG.SYS** file; be sure that "buffers" is set to <u>at least</u> 40 and "files" to at least 20. (Do not do this without you're your computer-support staff.)

3. PFA is now loaded. To access the PFA program, start at the drive where you installed the software (probably your "C:" drive), first type: "CD\ PFA" or "CD [space]PFA" to get into the PFA sub-directory which PFAINST created, then type: "PFA" to run the PFA program.

<u>Alternative DOS Installation:</u>

1. Change the "prompt" to the drive where you have inserted the PFA diskette (probably your "A:" drive).

2. Create a directory named "PFA" under C:. To do this, at the C: prompt, type the command "MD [space] PFA" then key "ENTER." Next type "A:" then key "ENTER." You are now at the A: prompt.

3. Next type the command "COPY [space] *.* [space]C:\PFA, then key "ENTER." This copies the 7 PFA compressed installation files from the diskette to where you will install the PFA program.

4. Next, type "C:\PFA." You are now at the C:\PFA prompt.

5. Now, in succession, you will unzip individually 5 of the 7 compressed, executable files: PFAFXPS.EXE, PFAFILES.EXE, PFAPROGS2.EXE, FOXPRO02.EXE, and FOXPRO01.EXE. ***Do not unzip <u>PFAINST.EXE or PFAINST.TXT.</u>*** doing so will generate a critical error, stopping the installation process. To execute the 5 other files, type the file name at the C:\PFA prompt, then key "ENTER," allowing the file to execute. Once the execution is complete, you will be returned to the C:\PFA prompt. Repeat this for the other 4 files.

6. PFA installation is now complete. To run PFA, you will start your PC to run under DOS, then change to the C:\PFA prompt and type "PFA."

If your computer is connected to a LAN, your computer may have insufficient random-access memory (RAM) for PFA to run. To remedy this, try booting your machine without the network. Again, you may wish to seek assistance from your computer-support staff.

Additional Information for* Windows 3.1 *USERS:

CDC's experience with PFA installation within a Windows 3.1 environment is not current. Prior experience showed that Windows 3.1 usually fails to recognize that PFA may be using the same upper RAM (true memory, not hard-drive space) locations that Windows routinely uses. Consequently, most users experienced difficulty in loading and using PFA <u>under</u> Windows. The most common-used solution to this conflict is booting to DOS instead of to Windows. Once you are able to boot to DOS, please follow the procedures above

for DOS users.

FOR ALL PFA USERS:

1. Please note that for PFA v. 2, you should be using PFA registers (that is, the six data-collection forms) revised in 1991. If you received your registers before 1991, please request that we send you the current registers.

2. Please understand that rapid changes in computing technology, including Windows and LANs, have resulted in varied computer environments. Because of this, these installation instructions may not permit PFA to operate efficiently in all environments. If you have any difficulty installing or running PFA, then please let me know by mail, phone, fax, or e-mail; here is what you will need for communications:

> Centers for Disease Control and Prevention
> National Center for Chronic Disease
>   Prevention and Health Promotion
> Division of Reproductive Health
> Program Services and Development Branch
> Services Management and Research Team
> 4770 Buford Highway, N.E.
> Mailstop K-22
> Atlanta, Georgia 30341-3717
> phone:(770) 488-6301
> fax: (770) 488-6518
> E-mail: Wboyd@cdc.gov.

3. For instruction in use of PFA, please see the <u>PFA Data Processing Manual</u> and the <u>Patient Flow Analysis (PFA) Data Collection Manual</u>.

Besides me, the Services Management and Research Team (SMART) consists of Mary Dabo Brantley, M.P.H., Terry Bolden, M.P.H., Michelle Hynes, M.P.H., Mary Kay Larson, M.P.H., Dr.P.H. (ABD), and Barbara Tomczyk, Ph.D. CMU offers on-going technical assistance on PFA and is generally available for consultation from 7 am to 5 pm.

> Sincerely yours,

> William A. Boyd, M.A.
> Services Management and Research Team
> Program Services and Development Branch
> Division of Reproductive Health
> National Center for Chronic Disease
>   Prevention and Health Promotion

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